



# NBRSS<sub>Today</sub>

Supporting Scientific Research through Business Solutions

**February, 2002**

**“I do not believe you can do today’s job with yesterday’s methods and be in business tomorrow.”**

**Nelson Jackson**

<a href="#">News and Highlights</a>	Page 2
<a href="#">Staffing Update</a>	Page 2
<a href="#">Project Status</a>	Page 2
<a href="#">Functional Teams</a>	Page 2
Finance	Page 2
Property	Page 3
Travel	Page 3
Acquisition	Page 4
Supply	Page 4
R&D Contracts	Page 4
SSF	Page 4
<a href="#">What’s Next</a>	Page 5
<a href="#">EHRP Status</a>	Page 5
<a href="#">Executive Corner</a>	Page 5
<a href="#">Change Management</a>	Page 6
Communication	Page 6
Training/Workforce Planning	Page 7

## *From our Project Manager...*

The NBRSS Today has been established to keep the NIH community informed about the ongoing activities of the NIH Business and Research Support System (NBRSS) project, including the NIH Business System (NBS) and the Enterprise Human Resources and Planning (EHRP) System.

The NBS Functional Teams and their NIH advisory groups have completed the development of the future business processes and are concluding their review and approval. In November, the teams completed the Design Phase of project implementation, and subsequently, have moved into the next phase— Configuration. During this phase, the Oracle software will be adapted and tested to support the new work processes.

Meanwhile, the Enterprise Human Resources and Planning (EHRP) system team has provided PeopleSoft demonstrations to over 250 members of the NIH human resources community.

Read further for specifics on the two ERP project initiatives.

Colleen Barros  
Project Manager, NBRSS

## **News & Highlights:**

**Staffing Update:** The NBRSS is pleased to announce the addition of Tony Amatucci, formerly with the NIH Office of Human Resource Management, and Olivida Myles, from the National Institute of Aging, to the EHRP project. Tony will be handling important EHRP functional activities, such as setting up access to the EHRP for authorized NIH users and administering "workflow" within the system, and Olivida will be providing program assistant support to the EHRP Project Team.

Sally Murray, from NIH Office of Human Resource Management/Human Resource Development Division, has joined the Change Management team to lead the NBS and EHRP training effort. This is a substantial undertaking, involving the oversight of the design, development, and implementation of a comprehensive training program that will provide a basis for continuing education within the NIH.

**NBS Project Status:** The NBS Functional Advisory Committees (FACs) are wrapping up their review and approval of the new business processes, as the Functional Teams forge ahead with the first stage of system "configuration." This is a term of art describing the process of customizing the Oracle software to support the newly designed processes and determining which process variations best suit NIH business needs. All configuration decisions are thoroughly tested to ensure the software is producing the expected outcomes.

In our last issue of *NBRSS Today*, we described two pilot sessions that are included in the Configuration Phase - Conference Room Pilots 1 & 2 (CRP1 & CRP2). These sessions are controlled environments in which the Functional Teams and Systems Integrator configure and test the work processes. As this exercise proceeds, the teams may find some work processes that require modification, and therefore, reconfiguration and additional testing.

To help you better understand the configuration process, here is a real world example. Cellular phones are designed to support typical user needs, but to optimize performance, the individual user configures the phone by providing a password for security purposes; entering frequently called numbers for future reference; establishing sound and ringing criteria; and selecting other preferences from a menu of choices. In turn, the phone's software uses information supplied by the user to support searches and satisfy other user requirements. The NBS functional teams are similarly setting the internal Oracle software "switches" for general applicability. They will fine-tune them as the system is tested and retested in the pilot sessions.

Additionally, all NBS Functional Teams are working closely with the Change Management Team, identifying potential workload changes that may result from system implementation and assessing training needs for the NIH user community

## ***An inside look at the NBS Functional Teams...***

**Finance** - Wayne Berry, Della Wilson, and Mary Cushing have been meeting with various groups at NIH and HHS, discussing the Chart of Accounts structure being proposed for the NBS. This structure determines how accounting and budget information will be collected and used for external and management reporting purposes. The team

<http://nbs.nih.gov>

**NBRSS TODAY**

has presented the proposed Chart of Accounts to their FAC and Resource Team (RT); the Property and Acquisition/Supply Functional Teams; the Budget Officers; the Administrative Management Systems Steering Committee; and the HHS Unified Financial Management System team. Their presentations are yet another step of many taken to ensure open communications with the stakeholder groups.

The Finance FAC has reviewed and approved summaries of the new work processes for General Ledger and Accounts Receivable. They are presently finalizing the Accounts Payable processes.

Meanwhile, the Finance Team has been working closely with representatives from the NIH Budget and Finance community and KPMG consulting, to ensure smooth and timely configuration of the Oracle product for the first pilot session. Wayne, Mary and Della are currently using a generic copy of a test system to get familiarized with the functionality of the Oracle configuration. Their next step is writing test scripts to guide their efforts with the NIH configuration during the first pilot session.

***Property*** – Candy Mason, Ron Boardley, and the KPMG property Functional Team continue working with their FAC, RT, and various property & finance management counterparts throughout NIH, ensuring that the documented NBRSS NIH Property Management processes correctly mirror DHHS & NIH requirements. Processes have been completed for manual additions and adjustments; transfers of accountable property; work order generation; and contractor property summaries. The property FAC has reviewed and approved the summary of the new work processes for the purchase and lease of accountable property.

Datastream software was installed in November 2001. Candy and Ron are currently reviewing alternatives for meeting NIH disposal and inventory requirements that were captured within the original property management NBS functional requirements document and have begun the initial steps for configuring and testing the new application.

***Travel*** – Kathy Chiacchierini and her KPMG Travel Consultant continue working with the Gelco/Oracle team to successfully interface the Oracle accounting system with the Gelco “Travel Manager” system, creating an end-to-end integrated solution allowing for:

- Merging Oracle human resource data and Gelco traveler profiles,
- Choosing an Oracle project task number, equivalent to the current CAN, from within Gelco Travel Manager,
- Checking Oracle funds within Gelco Travel Manager,
- Synchronizing Oracle purchase orders with Gelco travel order numbers, and Oracle invoice numbers with Gelco travel voucher numbers.

The Oracle/Travel Manager integration also provides systemic generation of accounting entries in the general ledger, matching of invoices to purchase orders (obligations), and reimbursement of travel expenses and advances.

Consistent with the configuration phase, the Travel Team is currently adapting the Travel Manager software to satisfy NIH requirements. Meanwhile, their RT and FAC members are assisting with the realignment and consolidation of travel object class codes and naming conventions to be utilized in the new system.

***Acquisition*** – Dorann Penney, Jim Marx, and Dennis Black, together with their KPMG counterparts, have completed development of all work processes applicable to simplified acquisition mechanisms and non-R&D contracts. All processes have been subject to RT review and FAC approval. Currently, the team is in the initial stages of CRP1, where they are developing testing circumstances to prove that their concepts will work as expected. After all processes are in place, the test script summaries and the test scripts will be established to verify all of the functionalities. Subsequently, the RT will once again provide their knowledge and expertise to identify common pathways throughout the acquisition process and individual nuances that may occur with any procurement action. Their FAC continues to provide guidance for the overall activities.

***Supply*** – Dave Rhoads and JD Thomas have been busy working with KPMG, configuring the Oracle product for use in CRP1. After the set up, they will begin testing scenarios that were developed earlier in the project. Dave, JD, and several NIH supply and personal property staff recently attended a demonstration of the Oracle Warehouse Management System (WMS). Tentatively, the WMS appears to be an excellent warehouse automation product and could potentially replace the existing RIMS/ADB system at the Gaithersburg Distribution Center.

***Research & Development (R&D) Contracts*** – Mary Armstead, Dave Snight, and their KPMG consultant have completed the Design Phase of the project. The resulting R&D contract processes have been vetted by their RT, and the FAC is currently examining the award and post-award designs, focusing on the more significant changes expected to result from future process implementation and their impact on the R&D contracting community.

With the project now in the early stages of configuration, Dave and Mary are directing their attention to system set-up in preparation for unit testing of the Oracle and Compusearch system software. This will involve close interaction with the KPMG System Integrator to ensure, for example, that required rules are defined within the system, default system parameters are set, and that appropriate data required for testing are identified and converted. Parallel with these efforts, the team will develop test scripts, identifying all possible scenarios and variations within each process. These scripts will guide the testing efforts, and ensure that optional approaches for executing specific functions are explored and that the system's full capabilities are thoroughly tested.

***Service & Supply Fund (SSF)*** - Nancy Parfitt Hondros and Diane Charuhas have completed the set-up phase for Oracle 'Projects' implementation, where they identified how the Oracle system can be implemented to meet the needs of the NIH SSF businesses and support the NIH mission. As you may recall, Oracle Projects is a powerful database product that supports work order entry, project costing, and project billing and provides a bridge between operations, systems, and corporate finance. The RT, FAC, and individual SSF businesses provided the team with valuable guidance for the next stage - configuration. The SSF team is now configuring the software to satisfy NIH requirements and is preparing for testing in the first pilot session. Nancy and Diane are also collaborating with the Finance team to expand the applicability of Projects to the entire NIH community, using it as a management analysis tool to review a broader activity or

<http://nbs.nih.gov>

**NBRSS TODAY**

program from the financial perspective in a greater depth and through a number of dimensions.

### ***What's Next???***

As the first pilot session progresses, the individual work processes will be tested to ensure that they each function as anticipated with the configuration. During the second pilot session, the software will be further tested to ensure that all NBRSS functions are integrated. Resource Team members will have the opportunity to participate in the testing and provide their input. Interfaces between the various functions and between the ADB and NBRSS will be tested to verify their effectiveness, and system administration will be tested to evaluate cross-functional integration of workflow, including human resources. Finally, data conversion and interfaces between the NBRSS and ADB will be fully tested using live data, whenever feasible.

### ***EHRP Project Status...***

In November, we began the NIH "fit/gap" sessions to determine where the EHRP meets (fits) and does not meet (gaps) NIH requirements for processing personnel actions. All of the eight scheduled sessions on the PeopleSoft system have been conducted. Session participants from the NIH human resources community have identified important gaps/policy issues in the system, which will be addressed in the appropriate forums, e.g., DHHS Program Support Center, NIH human resources leadership, NIH management, etc.

Members of the EHRP team, in conjunction with staff of KPMG Consulting, have presented 14 demonstrations of the system to greater than 250 members of the NIH human resources staff. Plans are underway to demonstrate the system to the equal employment opportunity, administrative, and supervisory/managerial communities. These demonstrations are intended to show individuals what the system will look like and highlight some of the different functionalities of the system - the NIH employees who have attended these sessions have favorably received the demonstrations. A briefing on the EHRP system will be presented to the NIH Partnership Council on January 22.

EHRP/PeopleSoft Hands-On Workshops have also been scheduled for NIH Human Resources (HR) staff. These 4 workshops consist of hands-on, self-paced exercises that will allow students to experience the look and feel of the new DHHS EHRP/PeopleSoft system. Please visit the CIT training website for exact dates and locations - - and to sign-up!

Also, similar to the NBS, the EHRP will soon be establishing a Functional Advisory Committee and Resource Team. The NIH Deputy Director for Management will be sending a memorandum to the NIH Executive Officers and OD Office Heads requesting nominations to serve on these key groups.

### ***Executive Corner...***

On 12/13/01, the Finance team introduced the proposed Chart of Accounts to the AMSSC, and highlighted the future benefits from three vantage points:

- Budget Officers/Executive Officers/Program Officials

- More timely and accurate reporting
- Less reconciliation required
- ❑ Financial Officials
  - More accurate financial reports
  - Improved internal controls and more timely information will reduce the need for manual oversight of funds control
- ❑ Scientists
  - Ability to track budgets at very fine level of detail

The expected challenges mentioned were that the use of the CAN structure will change, and an initial investment of time will be required to ensure that information is captured correctly.

The AMSSC will continue meeting on the 2<sup>nd</sup> and 4<sup>th</sup> Thursdays of the month. For an updated listing of the members and most recent meeting minutes, please click here. <http://nbs.nih.gov/index.html>

### ***Change Management...***

**“The first step toward change is awareness. The second step is acceptance.” -- Nathaniel Branden**

While the six NBS functional teams were designing work processes, potential organizational changes were identified and are now being analyzed by the Change Management Team. Accurate assessment of these impacts is necessary because it lays the foundation for subsequent change management initiatives, such as developing appropriate training and workforce transition plans for the NIH community.

Some of the changes were easily identified in the Design Phase of the NBS project, but others may not become apparent until the system has been configured and tested in the pilot sessions. As organizational changes are identified, their impacts will be reevaluated and refined following each pilot session. As these impacts are solidified, they will be communicated to the NIH community to prepare users for arrival of the new system.

### ***Communications...***

NBRSS team members have given project updates to the Acquisition Management Committee, Simplified Acquisition Committee, Budget Officers, IC Directors, Principal Travel Assistants, Office of Equal Opportunity, Intramural and Extramural Administrative Officers, AMSSC, and the Department. Upcoming presentations will be scheduled for the Property, the Extramural Program and Information Technology Management Committees, and Scientific Directors. Please contact Gail Kaldeš if you would like an NBRSS team member to address your group <mailto:kaldesg@mail.nih.gov>.

### ***Training...***

**NBS** - The Change Management Team has begun collecting data on the number and types of users requiring training for the NBS and the classes that will be offered to equip NIH users with the knowledge and skills needed to successfully transition to the new system. A high-level training strategy has already been developed, and the next step is to develop individual training plans for each functional area, detailing the exact numbers of users needing training, the specific training classes required, and the time frame in which the training must occur.

**EHRP** - The EHRP and Change Management Teams, in conjunction with KPMG Consulting, have begun planning the Department's EHRP system training. DHHS developed the training curriculum and materials and will be delivering the training. Training materials will be supplemented with NIH-specific policies and procedures. EHRP training is scheduled to take place from late April to mid-June, 2002. Look forward over the coming months to more specific information regarding the exact time and location of the training.

### ***Workforce Planning...***

Some of the new NBS processes represent a significant change in how employees will complete their work, while others signify only minimal change. A Workforce Transition Strategy has been developed to ensure that appropriate staffing decisions are made to support the roll out of the NBS. Detailed Workforce Transition Plans will be developed prior to deployment, identifying specific staffing needs in each functional area.

### ***Questions/Feedback...***

We encourage you to share this publication with your colleagues, staffs, or anyone else who may be impacted or interested in this project. For information, comments, or questions about the NBRSS project or newsletter, contact Marina Gregory at <mailto:gregorym@mail.nih.gov>. The next distribution of *NBRSS Today* is scheduled for the end of March.